

**MONTANA UNIVERSITY SYSTEM**

**OFFICE OF THE COMMISSIONER OF HIGHER EDUCATION**

46 NORTH LAST CHANCE GULCH, P.O. 203201, HELENA, MT 59620-2101

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**REQUEST FOR PROPOSAL**

**2007-2009, Perkins Act Reserve Fund Distribution  
To Strengthen Services to Special Populations  
Served Through Career and Technical Education Programs**

**Timeline**

August 16, 2007:	Funding Distribution Announcement finalized and sent to Perkins Eligible Recipients (postsecondary institutions and school districts)
October 1, 2007 5 p.m.	Deadline for accepting proposals for Reserve funds to strengthen services to special populations
October 15, 2007	OCHE announces recipients of Reserve Fund allocation.
July 15 2008	First-year progress report due to OCHE to qualify for continued funding.
July 20, 2008	Second year funding allocated
June 30, 2009	End of funding cycle.
August 20, 2009	Final Report due

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**Purpose**

The Carl D. Perkins Career and Technical Education Act of 2006 places a strong emphasis on providing activities to prepare special populations who are enrolled in career and technical education programs, for high skills, high wage, or high demand occupations that will lead to self-sufficiency [Section 135, required uses (9)].

The purpose of this funding, administered through the authorized “reserve funding” under the Act, is to allow eligible recipients of funds – postsecondary institutions and school districts – to contract with community-based organizations for strengthening and improving CTE services to students from special populations that are enrolled in

approved CTE programs. Community-based organizations are defined as Montana non-profit organizations.

## **Background**

Through a Memorandum of Understanding, in relation to the administration of the Carl D. Perkins Career and Technical Education Act of 2006, the Office of the Commissioner and Office of Public Instruction agreed to set aside a minimum of \$360,000 of Reserve funds for the biennium ending June 30, 2009. These funds are to be used to support partnerships between eligible recipients and community-based organizations, consistent with the Montana Carl D. Perkins Transition State Plan, as approved by the Montana Board of Regents, the eligible agency, and the United States Department of Education.

In fulfilling this Memorandum of Understanding, OCHE will designate funds that are identified for use under the "Reserve Fund" authority. These Reserve funds represent 10% of the 85% of the funds designated for local use i.e. secondary districts and postsecondary institutions.

In Montana's Carl D. Perkins Transition State Plan, a number of possible strategies to address the needs of special populations are identified. These strategies may be assessed to determine their relative impact on student outcomes.

The Perkins Act of 2006 identifies the following students as "special populations:"

- individuals with disabilities;
- individuals from economically disadvantaged families, including foster children;
- individuals preparing for non-traditional fields,
- single parents, including single pregnant women; and
- Individuals with limited English proficiency.

These strategies identified for consideration in the Transition Plan include:

- How Big Sky Pathway plans of study can be customized to identify supportive services and additional opportunities that special populations students will benefit from;
- How Big Sky Pathways (BSPs) can be adapted and offered to adult learners, particularly those who are part of special populations;
- How information about BSPs and other CTE programs can be targeted in career counseling for special populations students;
- How academic assessments, career interest inventories, and information about local and regional employment outlook information can be integrated into career and admissions counseling for special populations students;
- How regular support group meetings for special populations students can assist with retention;
- How outreach resources can be targeted to special populations in advertisements catalogues and course listings;

- How community-based organizations and other groups that work with two-year postsecondary institutions and school districts can develop collaborative services to help special populations experience a higher degree of success in the Perkins Performance Indicators and other metrics;
- How professional development can be offered to teachers and faculty to help them effectively work with and teach special populations students;
- How voluntary self-disclosure processes at the postsecondary level can be made more consistent and effective in identifying special populations students to receive services;
- How all school and college counselors can provide more effective counseling and guidance for special populations students;
- How financial aid and scholarship information can be made available to special populations students, including those who are economically disadvantaged, so they can understand opportunities for financing postsecondary education;
- How financial literacy/money management training can be provided for students, especially those receiving financial aid and who are economically disadvantaged or face other barriers;
- How information about additional scholarship funds can be made more readily available and/or targeted to special populations students;
- How information from national organizations (i.e. The National Alliance for Partnerships in Equity, Inc. (NAPE) and Women Work! The National Network for Women's Employment) can inform practices and policies in Montana;
- How outreach and recruiting activities for students in special populations can be better coordinated between secondary schools and two-year postsecondary institutions, particularly with respect to federal student record privacy concerns;
- How career planning orientation, assessment, life skills and job readiness workshops, small group meetings, counseling and tutoring services for special populations can be integrated into CTE programs that provide challenging academic content and relevant career and technical education content; and
- How materials about Big Sky Pathways, and other relevant resources and counseling, can be provided to students with limited English Proficiency, addressing language barriers.

Of the strategies that are implemented, they will be reviewed over time for their effectiveness. School districts and postsecondary institutions using Reserve Funds for these purposes will not be expected to fully implement every strategy listed.

## Distributions of Funds

The state will award \$360,000 of the FY 2008 Reserve fund to provide services to special populations enrolled in secondary or postsecondary career and technical education programs. Successful applicants will be allocated a minimum of \$30,000 to a maximum of \$60,000 for the biennium with no more than \$15,000 to \$30,000 awarded each year of the biennium.

The first year of funding will be awarded in October 2007 (*see timeline*). Dependent upon federal allocation, the second year of funding will be approved if the recipient has met adequate progress in implementing its objectives during year one. The second year of funding will be available after July 20, 2008 (*see timeline*). Only an “eligible recipient” as defined in the Perkins Act (two-year postsecondary institutions and school districts) may apply for Perkins Reserve funds to serve special populations through this competitive process.

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## Application

### Abstract

The application shall contain an *Abstract that will* describe how the goal of the program to be implemented will be carried out i.e. strengthening the services to special populations. The *Abstract* must further indicate how the applicant will utilize the contracted services of a community-based organization (as defined) to meet the goal of the identified program.

### Objectives, Activities and Evaluations

To carry out the goal (s) of the proposal, the applicant MUST develop a two-year plan that will contain the following elements:

1. Name of the specific community-based organization (defined as a Montana non-profit organization) that has agreed to enter into a contract with the eligible recipient to provide services to improve the performance of special populations enrolled in secondary or postsecondary CTE programs;
2. A clear statement indicating the objectives that will address the goal (s) **in each year of the two-year duration of the grant** that demonstrates how the services offered by the community-based organization will directly and primarily benefit individuals who are members of special populations who are currently enrolled in a CTE program of study offered by the eligible college or school district. These objectives must be directly tied to the

- secondary and postsecondary core indicators of performance for Perkins IV legislation (Section 113(b);
3. How the services offered by the community-based organization address required and permissive uses as detailed in Section 135 of the Perkins legislation as well as relate to and support priorities identified by Montana in its Carl D. Perkins Transition Plan;
  4. A list of activities designed to achieve each objective; and,
  5. A statement of evaluation for each objective.

## **Plan of Operation**

This is the section where the many components of the program designed to strengthen services to special populations enrolled in career and technical education programs will be described. This is the opportunity to demonstrate the overall consistency of the plan in relation to its conceptual framework, objectives, activities and evaluation.

## **Accountability**

Indicate how the community-based organization in coordination with the eligible postsecondary institution or school district (specifically, the contact person responsible for managing Perkins funds at the secondary and postsecondary level) will collect data on program quality and program impact, and will include data on the accountability indicators required by the Perkins Act

## **Eligibility and Submission**

Any Perkins eligible postsecondary institution or secondary school may present a proposal for Perkins Reserve Funds. Proposals must contain the following forms, all available on the website of the Workforce Development Unit of the Office of the Commissioner of Higher Education ([www.mt.edu/wochewd](http://www.mt.edu/wochewd)):

- Data Contact
- Certificate and Assurances
- Debarment
- Lobbying
- Detailed Budget

Proposals must be submitted by 5:00 PM, October 1, 2007 to the Office of the Commissioner of Higher Education, P. O. B. 203201, Helena, MT 59620-3201, Attn: George Burns. The proposals will be reviewed to determine if they meet the requirements of this announcement. Proposals meeting the requirements will be forwarded to a review panel for scoring and ranking based upon the scoring criteria included in this announcement.

Applicants for these funds may view Montana's proposed Perkins Transition plan on the following website: <http://mus.edu/wd/default.asp>

*Note: Any funds not allocated through this process will revert to the 10% Reserve category.*

### **Budget Request**

An eligible recipient must request between a minimum of \$15,000 and a maximum of \$30,000 for each year of the two-year biennium. A budget for FY 2008 and FY 2009 must be submitted with the proposal.

### **Matching Funds**

- No matching funds are required to receive this funding distribution.
- The application must **explicitly** state that the federal funds used in this project will supplement, not supplant other funding sources.

### **Reporting (see *timeline*)**

The recipients of funds will be announced on or before October 15, 2007. On July 15, 2008, the first year report will be due to OCHE. This report will be reviewed to determine progress in meeting the program's objectives for year one. Second year funding will be available July 20, 2008 for programs that demonstrate progress. The end of the funding cycle will be June 30, 2009. A final report to the OCHE will be due August 20, 2009.

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## **SCORING CRITERIA**

***Total Points: 100***

### **Abstract (10 Points)**

- What is the Community-Based Organization that will provide services?
- What services will be provided?
- What is the overall goal of the project?
- What evaluation method will be utilized to measure progress toward meeting the objectives of the project?

### **Objectives, Activities and Evaluation (40 points)**

- Are the goals and objectives clearly stated for the two-year duration of the project?
- How well does the applicant tie the objectives to the Core Indicators of Performance? [Title I, Section 113].
- How clearly does the applicant list the activities designed to carry out the program objectives for each of the two years?
- Are the evaluations clearly listed for each of the program years and do they directly evaluate the appropriate objective?

### **Accountability and Performance (25 points)**

- Are the data collected related to program quality and program impact as well as the data on the accountability indicators required by the Perkins Act specifically mentioned in the application?
- How will substantiating data be collected?

### **Plan of Operation (20 points)**

- Does the overall plan address the specific needs of special populations enrolled in career and technical education at either a secondary school or postsecondary institution?
- Are the strategies to be implemented tied to the Required and Permissive Uses of funds in Section 135 of the Carl D. Perkins legislation of 2006?
- Is there consistency within the plan when this section is read in its entirety?

### **Fiscal Management (5 points)**

- Does the fiscal management reflect budgets and budget narratives for two separate years?
- Do the budgets calculate correctly?
- Is a copy of the contract with the Community-Based Organization included?
- Do the figures in the budget line items correspond accurately to the appropriate line items on the budget pages?

### **Addenda**

Points should not be awarded for addendas to the application or for their content. However, it is important for the reader to check the addenda for pertinence, substantiation of the application content and other clarity.